Store To Door

Client Portal
Onboarding Guide

Table of Contents

For easy access for future orders, either bookmark the login page for our portal or simply visit www.storetodoorcanada.com and click login.

If you have any further questions please reach out to our Customer Success team through the "Help" function in the Client Portal, email support@storetodoorcanada.com, or you can refer to our help videos for further details.

Sign In

How to sign in for the first time

1   Once the S2D team has added you as a user to your company you will receive an email with your
    Company ID, email address, and temporary password.
    a.   If this email is not in your inbox, check your spam/junk folder or reach out to
         clientonboarding@storetodoorcanada.com.

2   From the email you will click the **sign in button** which will take you to the client portal.
    a.   Enter the temporary password from the initial activation email.
3   Click the sign in button.
4   You will be prompted to **change your password** (Password must include at least one special character, at
    least one capital letter, and at least one number).
5   Click the sign in button again.
6   **Read and agree** to the terms and conditions.

Create Orders

How to create an order

1 Click on the create orders tab (left hand side)

2 Pickup location

    a. If you have multiple locations make sure you are clicking on the right one.

3 Pickup date

    a. This can either be today's date or future date.

    b. Format is year, month, day or click on the calendar icon on the right hand side to click the date from a calendar.

4 Pickup time

    a. This is the window that a driver will be there to pick up the order(s).

    b. Orders must be entered at least 60 minutes before the pickup window begins.

5 Click add a delivery

    a. Enter the **recipient's cell phone number**. This will send a tracking link to the customer to view when their order is on its way and delivered.

    b. Enter the first and last name of the recipient.

    c. **Enter the destination of the recipient**. Enter the address in the search address field to allow Google Maps to auto-fill the address fields. Once the fields have been auto-filled, please ensure the information is correct and any apartment/unit number is entered if necessary.

    d. Enter the **number of packages** being delivered to the recipient.

    e. Enter any **delivery notes** (if applicable). These are visible to both our dispatchers and the driver.

    f. Click the **add button** on the bottom right hand side.

Add Delivery

Recipient

Phone Number
Tracking link is sent to this number

1 (306) 555-5555   CLEAR

☐ Do not send tracking link

Full Name

Rebecca Test

Destination

Search Address

2375 College Ave, Regina, SK, Canada

Number

2375

Street

College Avenue

Apt / Unit

Apt / Unit

City

Regina

Province / State

Saskatchewan ▼

Country

Canada ▼

Postal / ZIP Code

S4P 4W7

**Number of Packages**

2

Delivery Notes

Please leave the package on the front step if no one is home.

Cancel   **Add**

6   If you have more deliveries you would like to add, you can do so by clicking add a delivery again to enter the delivery recipient's information.

7 Once you have added all of your deliveries, click the submit button.

    a. Submit and print labels - Recommended as you can print the labels to stick them on the appropriate package(s).

    b. Submit order - You can later print labels if you forget.
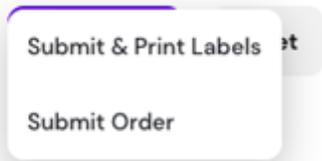
8 Submit and print labels - The labels will automatically open in a new tab for you to print and stick on the orders.

Manage Orders

How to view order details

1. Go to the manage orders tab (left-hand side).
2. Click on any order. This will show:
   a. Order ID.
   b. Status of the delivery:
      i. Pending - Order has been placed.
      ii. Assigned - Order has been assigned to a driver.
      iii. Active - driver is out to pick up the order.
      iv. Delivered - order has dropped off the order.
   c. Delivery type (Regular, Oversize, Rush).
   d. The number of packages.
   e. Dispatch notes - Dispatchers will write updates or notes related to the order here.
   f. Recipient information.
   g. Pick up information.
   h. Order notes.

← Order Details   🖨 Print Labels

96f73be4
Order ID   (Delivered)

Delivery Type   **Number of Packages**
Regular   3

Dispatch Notes

💬 May 10 at 11:08 am
    Second notes
    Lindsey I.

💬 May 10 at 11:07 am
    The driver said they handed it to the customer.
    Lindsey I.

Recipient Info

Admin Testing
2375 College Avenue, Regina, SK, CA, S4P 4W7
1 (306) 536-0123

Pickup Info

1801 Hamilton Street, Regina, SK, CA, S4M 0A1
May 5 at 7:45 am

Delivery Photos

Delivery Signature

Driver
Rebecca P.

Dropped off to Rebecca

How to delete an order

1   Go to the **manage orders tab** (left-hand side).

2   Click on an order you want to delete **(the status must still be in the pending or assigned a stage to delete)**.

    a.   If the order status has changed to active it can no longer be deleted. You will need to contact our dispatch team through the HELP button if the order needs to be returned to your store.
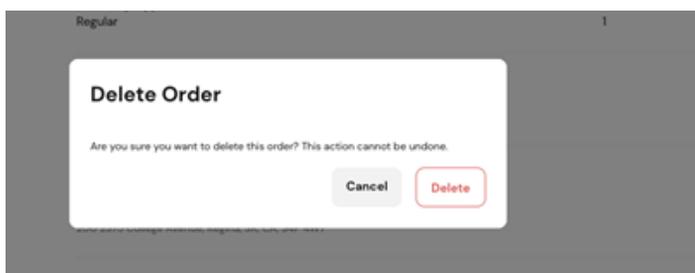

3   Scroll to the bottom of the page and **click delete order**.

    a.   A pop-up will appear where you will confirm you would like to delete it by clicking the delete button.

Roles

How to create a role

1. Go to the roles tab (left-hand side).

2. Click the create a role button on the top right-hand side.

3. Enter a role name (i.e. Customer Support, Billing, etc).

4. Click the permissions (boxes) you want employees in this role to have access to

    a. The permissions that you click - whether that is all or just some - will be the tabs on the left that show for employees in this role.

        i. View all locations - This will override the assigned locations for the employee and allow them to view all locations within your organization.

        ii. View locations tab - If you click this option you have the ability to assign an employee just a specific location under their employee profile.

    b. The permissions that you do not click are tabs on the left that will be hidden.
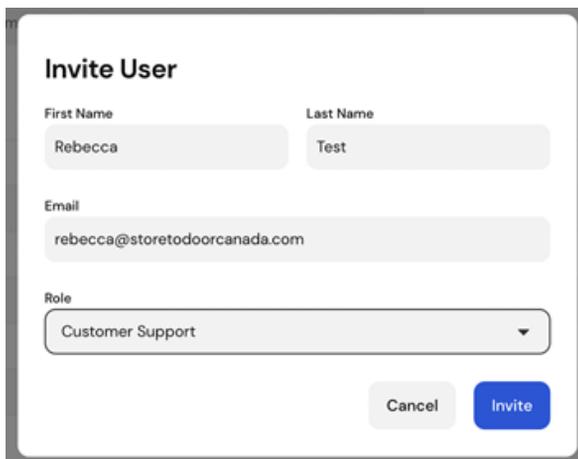

5. Click the **save button** on the bottom right-hand side.

Employees

How to add an employee

1   Go to the **Employees tab** (left-hand side).

2   Click invite employee.

3   Enter their first name, last name, and email address.

4   Click the role you would like them to be assigned to.

     a.   Roles allow clients to limit permissions for employees. To add roles please see the Roles section.

5   Click invite.

     a.   The employee will get an email with their temporary password to sign in.

6   If you assigned the employee a role where the "view locations tab" was selected as permission you will need to go into their profile (once invited)
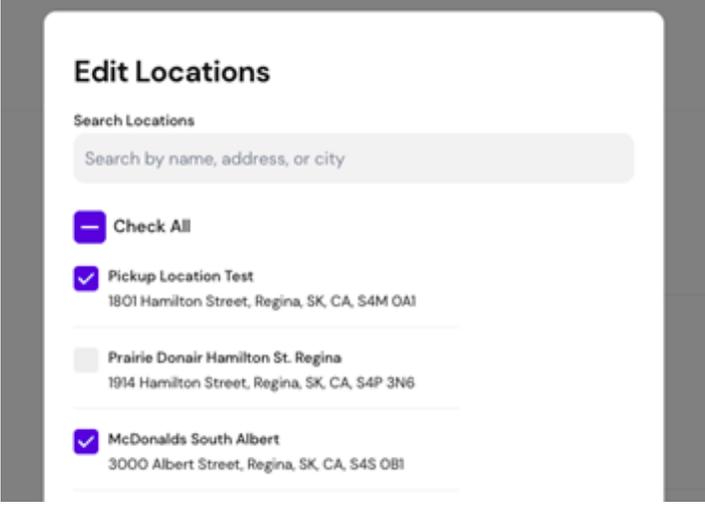
     b.   Click the locations menu.

b. Click the location(s) you would like to assign them too.

c. Click Save.

Invoices

How to view invoice details

1 Go to the billing tab (left-hand side).

2 All of the invoices are weekly periods from Sunday through Saturday.

    a. Available to view every Sunday.

3 If you want to export all of your invoices.

    b. Click the export as CSV button on the top right hand side.

📄 Export as CSV

4 Once you have clicked on an invoice.

    a. At the top it will show you the date range for the invoice.

    b. Summary will show the number of deliveries, delivery fees, extra charges (can click to view extra charge details), total including taxes.

Billing

← Invoice Details (May 01, 2022 – May 07, 2022)

Summary

6 Deliveries	$150.00 Delivery Fees	$3.00 Extra Charges	$160.65 Total (including taxes)

Invoice Paid

Orders   Delivery Fees

Search

Search by pickup location, recipient or phone number   📄 Export as CSV   📄 View PDF Invoice

ID	Pickup Location	Pickup Time	Recipient Info	Destination	Completed	Type	Delivery Fee	Outcome
b439a842	Pickup Location Test	Thu, May 5 2022 8:15 am	Override Name +13065360123	2375 College Avenue Regina, SK, S4P 4W7	Wed, May 4 2022 9:31 pm	Regular	$25.00	Failed
96f78ea4	Pickup Location Test	Thu, May 5 2022 7:45 am	Admin Testing +13065360123	2375 College Avenue Regina, SK, S4P 4W7	Wed, May 4 2022 9:23 pm	Regular	$25.00	Delivered
9b7f047b	Pickup Location Test	Wed, May 4 2022 4:00 pm – 5:00 pm	Rebecca	2375 College Avenue Regina, SK, S4P 4W7	Tue, May 3 2022 10:08 am	Regular	$25.00	Delivered
7535dbdf	Pickup Location Test	Tue, May 3 2022 4:00 pm – 5:00 pm	No Recipient	2375 College Avenue Regina, SK, S4P 4W7	Tue, May 3 2022 10:08 am	Regular	$25.00	Delivered

5 Click on view PDF invoice.

    a. It will open your invoice in a new tab where it will show you a summary of the line items (delivery count, delivery rate, extra charges, refunds, taxes).

Store To Door

+1.306.501.3734
storetodoorcanada.com
4906 Anthony Way
Regina, SK
S4X 0H4

Invoice

Bill To: OnFleet Sub-Org

Invoice # 0002-00045
GST# 798514063 RT0001
Invoice Date: Monday, May 9, 2022
Pay By: Wednesday, May 11, 2022

Description	Qty	Rate	Amount
Pickup Location Test - Kale Baiton - 1 - 99	6	$25.00	$150.00
Fuel surcharge of $0.50 per delivery for 6 deliveries at location Pickup Location Test			$3.00
Subtotal			$153.00
Canada GST		5.00%	$7.65
Total			$160.65

Note: Payment for charges on account will be withdrawn from the bank account on file each Wednesday following the billing period. Alternatively, payment can be accepted via e-transfer to glenn@storetodoorcanada.com.

6   Invoices must be paid within 30 days by auto withdrawal or credit card. Contact accounting@storetodoorcanada.com for more information.

Store To Door
www.storetodoorcanada.com
hello@storetodoorcanada.com

13

Client Alerts

What do client alerts mean?

Client alerts are created by the S2D team to advise clients of any delays or disruptions in delivery service

1   When creating an order, once you've clicked on your pickup location, pickup date, and pickup time, you may see a banner appear at the top of your screen.

    a.   If the banner is **yellow**, you are still able to create the order.

    b.   If the banner is **red**, you are unable to create the order.

Thank You

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